
ECF UTILITIES MENU

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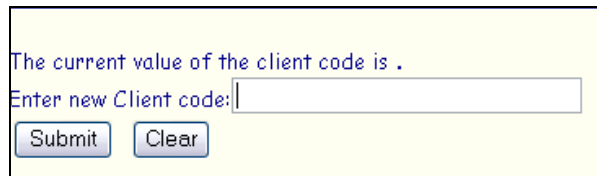
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Change Your Client Code

Allows entry of a new client code, used for reporting charges made to the current PACER account.

STEP 1 Select **Utilities** from the **Main Menu**, click **Change Your Client Code** hypertext link from the **Your Account** menu.

A screenshot of a web form titled 'Change Your Client Code'. The form has a yellow background and a black border. It contains the text 'The current value of the client code is .' in blue. Below this is a text input field with the label 'Enter new Client code:'. At the bottom of the form are two buttons: 'Submit' and 'Clear'.

- ♦ System will display current value of the client code if you used a client code upon logging into **PACER**.
- ♦ Enter a client code.

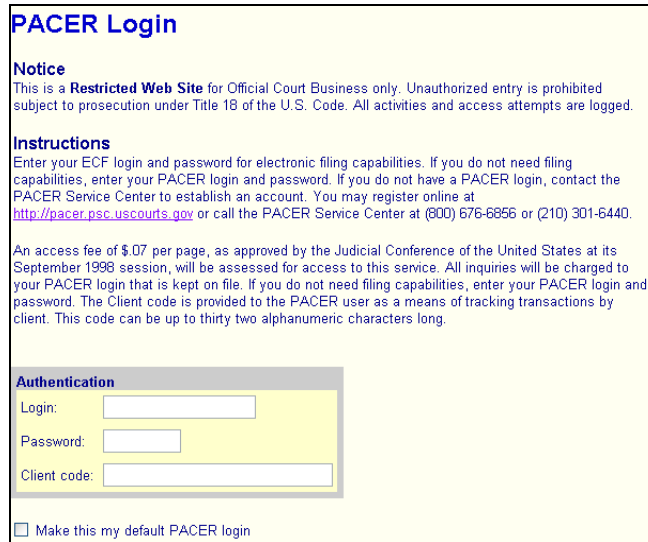
STEP 2 Click **Submit** to continue or **Clear** to reset.

STEP 3 System will display the new value of the client code. To continue click **Main Menu** option of your choice.

Change Your PACER Account

Displays the login screen to allow entry of a different PACER account. The new account can be designated as the default PACER login.

STEP 1 Select **Utilities** from the Main Menu, click **Change Your PACER Account** hypertext link from the **Your Account** menu. **PACER Login** screen appears.



PACER Login

Notice
This is a **Restricted Web Site** for Official Court Business only. Unauthorized entry is prohibited subject to prosecution under Title 18 of the U.S. Code. All activities and access attempts are logged.

Instructions
Enter your ECF login and password for electronic filing capabilities. If you do not need filing capabilities, enter your PACER login and password. If you do not have a PACER login, contact the PACER Service Center to establish an account. You may register online at <http://pacer.psc.uscourts.gov> or call the PACER Service Center at (800) 676-6856 or (210) 301-6440.

An access fee of \$.07 per page, as approved by the Judicial Conference of the United States at its September 1996 session, will be assessed for access to this service. All inquiries will be charged to your PACER login that is kept on file. If you do not need filing capabilities, enter your PACER login and password. The Client code is provided to the PACER user as a means of tracking transactions by client. This code can be up to thirty two alphanumeric characters long.

Authentication

Login:

Password:

Client code:

☐ Make this my default PACER login

- ♦ Enter PACER login, password and client code, if applicable.
- ♦ Click box to make this login your default PACER login.

STEP 2 Click **Login** to continue or **Clear** to reset.

Maintain Your ECF Account

This function allows you to update your personal information and instructions about email notification.

STEP 1 Select **Utilities** from the Main Menu, click **Maintain Your ECF Account** hypertext link from the **Your Account** menu. The **Maintain User Account** screen appears:

The screenshot shows a web form titled "Maintain User Account" with a yellow background. The form contains various input fields for user information, organized in two columns. The left column includes fields for Last name (Smith), Middle name (H.), Title, Office (Smith & Wesson), Address 1 (1000 Cabin Creek Road), Address 2, Address 3, City (Richmond), Country, Phone (804-123-4567), SSN, Bar Id, Initials, and DOB. The right column includes fields for First name (James), Generation, Typeaty, State (VA), Zip (23225), County (dropdown), Fax, Tax Id, Bar status, Mail group, and Person end date. At the bottom, there are two buttons: "Email information..." and "More user information...". Below these are "Submit" and "Clear" buttons.

STEP 2 Make appropriate changes or additions to your name, address, telephone number and/or fax number.

- ♦ **Email information...** button allows you to specify how you want to be notified of CM/ECF filings and the email address at which you want to receive notification, see **STEP 3**.
- ♦ **More user information...** button allows you to change your login name or password, see **STEP 4**.
- ♦ Click **Submit** button upon completing all changes/additions.
- ♦ Click **Clear** button to clear changes you may have made.

STEP 3 Upon clicking **Email information...** button, the E-mail information for your account screen will appear.

The screenshot shows a web form titled "E-mail information for James H. Smith". It contains the following fields and options:

- Primary e-mail address:** A text box containing "jsmith@usa.net".
- Send the notices specified below:**
 - ☒ **to my primary e-mail address**
 - ☒ **to these additional addresses:** A text box containing "assistjs@hotmail.com".
- ☒ **Send notices in cases in which I am involved**
- ☒ **Send notices in these additional cases:** A text box containing "01-60140".
- ☒ **Send a notice for each filing**
- ☐ **Send a Daily Summary Report**
- Format notices:**
 - ☒ **html format for Netscape or ISP e-mail service**
 - ☐ **text format for cc:Mail, GroupWise, other e-mail service**
- At the bottom, there are two buttons: "Return to Account screen" and "Clear".

- ◆ **Primary e-mail address** – specify the complete address.
- ◆ **Send the notices specified below** – select one or both options
 - ◆ **to my primary e-mail address**
 - ◆ **to these additional addresses** and add additional email addresses in text box
- ◆ To receive notices for a case in which you are not involved, check the box for **Send notices in these additional cases** and key the case number(s) in the text box.
- ◆ Select appropriate radio button to receive notice of electronic case filing for each case (**Send a notice for each filing**) or a summary report containing all cases (**Send a Daily Summary Report**).
- ◆ **Format notices** - select appropriate format
 - **html format for Netscape or ISP e-mail service**
 - **text format for cc:Mail, GroupWise, other e-mail service**
- ◆ Click **Return to Account screen** to continue making changes to your account and/or to submit changes once completed.
- ◆ Click **Clear** button to clear changes you may have made.

STEP 4 Upon clicking **More user information...** button, more user information for your account will appear.

More User Information for James H. Smith

Login Last login 07-21-2003 12:45

Password Current login 07-21-2003 12:45

Prid 1723 Create date 10/08/1998

Registered Y Update date 06/23/2003

Internet Credit Card N

Groups Attorney

- ♦ **Login** – you may change your login.
- ♦ **Password** – you may change your password. Note: When you type a new password, it is readable. Whenever this screen is displayed again, the password will be hidden.
- ♦ Click **Return to Account screen** to continue making changes to your account and/or to submit changes once completed.
- ♦ Click **Clear** button to clear changes you may have made.

STEP 5 After making all appropriate changes/additions, click **Submit** button. The system will display all cases you are involved in.

Searching for existing Attorney Records
Select the cases to be updated

CAUTION: If you modified name, SSN, Tax ID, or Bar ID on the previous screen, the new values will be recorded for ALL cases to which the person is linked. Modifications of other items will be recorded ONLY for those cases you select below. Click the question mark on the menu bar above for more information.

Update All

- 1999-07042 First Union Mortgage Corporation et al
- 1999-07045 Sears, Roebuck & Co. v. Davenport
- 1999-07046-SSM US Department of Education v. Davenport
- 1999-07059 Branch Banking & Trust Company v. Peel
- 1999-07063 Tidewater Finance Co., Inc. v. Smith
- 1999-60176 Robert Lee Patterson
- 1999-60181 Harry Allen Smith and Bubbette Smith
- 1999-70132 Clark-Smith Associates, P.C.
- 1999-70166 Swindell B. Slick and Trixie B. Slick

- ♦ **Update All** – default selection, click **Submit** button to have address information spread to all cases
- ♦ To have address update spread to specific cases but not all, hold down **<Ctrl>** key on keyboard while clicking on specific cases
- ♦ Click **Submit** button to update your account
- ♦ Click **Clear** button to clear selection

STEP 6 After clicking submit button the system will display update information, to continue click **Main Menu** option of your choice

Updating person record...
Update Person Prid: 1723

The update was successful.... prid 1723 - John M. Smith

Updating user record
The user update was successful

The update was successful....

Set up automatic e-mail notification complete for John M. Smith
Send Notification in all cases for which you represent a party = on
Send Notification to primary e-mail address = on
Case list:
[01-60140 Connie J. Hicks](#)

E-mail notice of electronic filings for selected cases= on
Summary e-mail = off
Primary e-mail Address: jsmith@usa.net
Additional e-mail Address:

Formatting of notices = HTML (Internet e-mail)
User edit complete

Review Billing History

Displays the number of CM/ECF pages accessed and charges incurred for the PACER account currently being used. If you enter client codes when you access CM/ECF, the charges are totaled for each code.

STEP 1 Select **Utilities** from the Main Menu, click **Review Billing History** hypertext link from the **Your Account** menu.

Review Billing History

Transactions dated: 07/01/2003 to 07/21/2003

Sort: Date ▼

Submit Clear

Date
Client code / Date

STEP 2 **Transactions dated:** - enter a date range for the report to display

STEP 3 **Sort:** - click ▼ arrow to the right of the box to select how you would like the report to sort

- ◆ Date range
- ◆ Client code/Date

STEP 4 Click **Submit** to continue or **Clear** to reset display criteria. Billing history will display.

PACER User: us4605
Court: 0422 Eastern District of Virginia

Date	Time	Pages	Client Code	Description	Search Criteria
07/01/2003	11:43:53	1		Docket Report	03-74775
	12:12:14	2		Docket Report	01-72573-SCS
	12:12:32	30		Image	01-72573-SCS
	16:28:18	1		Docket Report	03-74804
	16:29:34	1		Creditor List	03-74776-SCS
	16:29:49	1		Docket Report	03-74776-SCS
SUB TOTAL:		36	pages		
		\$ 0.07	per page		
		\$ 2.52	charges		

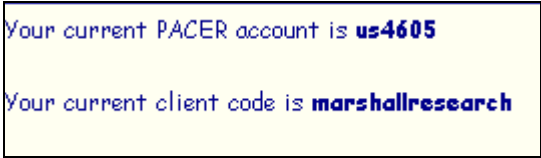
Date	Time	Pages	Client Code	Description	Search Criteria
07/05/2003	13:02:20	1		Docket Report	03-36377-DOT
SUB TOTAL:		1	pages		
		\$ 0.07	per page		
		\$ 0.07	charges		

- ◆ Click **Back** to return to the Utilities main menu or you may click **Main Menu** option of your choice.

View PACER Account Information

Displays the current PACER login and client code, if applicable.

- STEP 1** Select **Utilities** from the Main Menu, click on **View PACER Account Information** hypertext link from the *Your Account* menu. System displays the account information and client code, if applicable, used to log into PACER, to continue click **Main Menu** option of your choice.

A screenshot of a yellow rectangular box with a black border. Inside the box, there are two lines of text. The first line reads "Your current PACER account is" followed by "us4605" in a blue, monospace-style font. The second line reads "Your current client code is" followed by "marshallresearch" in the same blue, monospace-style font.

Your current PACER account is **us4605**
Your current client code is **marshallresearch**

View Your Transaction Log

Displays details of all transactions (docketing) that the current user has entered into CM/ECF for a specified time period.

STEP 1 Select **Utilities** from the **Main Menu**, click **View Your Transaction Log** hypertext link from the **Your Account** menu. **View Transaction Log** screen appears. Click in the dialog boxes of **Start Date:** and **End Date:** and type the dates of report you want displayed.

View Transaction Log

Enter the Date Selection Criteria for the Transaction Log Report

Start Date: End Date:

STEP 2 Click **Submit** after completing date selection or **Clear** to reset search criteria. The **Transaction Log** screen appears.

Transaction Log			
Report Period: 07/01/2003 - 07/21/2003			
Id	Date	Case Number	Text
0	07/09/2003 15:48:28	3-03-bk-30127	Chapter 13 Plan and Related Motions and Notice Filed by Debra H. Lowe of Dewey, Cheatham & Howe on behalf of Debbie Lowe. (Lowe, Debra)
1147699	07/01/2003 14:40:22	3-01-bk-60023	Application for Compensation for Barry Strickland, Accountant, Fee: \$3200.00, Expenses: \$150.00, for Sarvor, Inc., Auctioneer, Fee: \$1400.00, Expenses: \$200.00. Filed by Debra H. Lowe. (Lowe, Debra)
1148236	07/08/2003 13:13:44	3-02-bk-60108	Motion to Substitute Attorney <I> for Debtor</I>. (Lowe, Debra)
1148236	07/08/2003 13:13:45	3-02-bk-60234	Motion to Substitute Attorney <I> for Debtor</I>. (Lowe, Debra)
1148236	07/08/2003 13:13:45	3-02-bk-60105	Motion to Substitute Attorney <I> for Debtor</I>. (Lowe, Debra)
1148478	07/09/2003 15:48:25	03-30127	Opened New BK Case 03-30127
1148478	07/09/2003 15:48:26	03-30127	insert 2 creditors loaded
1148505	07/09/2003 17:13:07	3-03-bk-30035	Motion for Relief from Stay Re: Furniture filed by Debra H. Lowe of Dewey, Cheatham & Howe on behalf of Pier One Imports. Hearing scheduled 8/5/2003 at 11:00 AM at Chief Judge Tice's Courtroom, 1100 East Main Street, Room 335, Richmond, Virginia
1149309	07/21/2003 14:26:00		Updated person record: Debra H. Lowe Prid: 1723
1149309	07/21/2003 14:26:00		Updated user record: lowee 1723
1149324	07/21/2003 14:43:25		Updated person record: John M. Smith Prid: 1723
1149324	07/21/2003 14:43:26		Updated user record: lowee 1723
1149326	07/21/2003 15:05:48		Updated person record: Debra H. Lowe Prid: 1723
1149326	07/21/2003 15:05:48		Updated user record: lowee 1723
Total Number of Transactions: 14			

STEP 3 To print transaction log, click **Print** from browser toolbar.

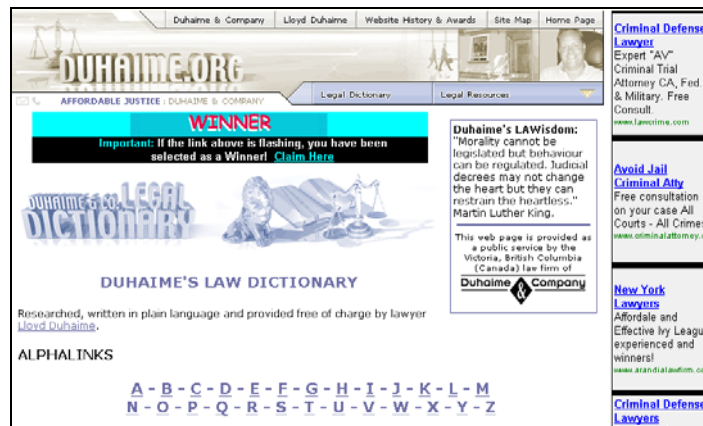
STEP 4 To continue, click **Main Menu** option of your choice.

Legal Research... Law Dictionary

This option links to a Web site “researched, written in plain language and provided free of charge by lawyer Lloyd Duhaime”.

STEP 1 Select **Utilities** from the **Main Menu**, click on **Legal Research...** hypertext link from the **Miscellaneous** menu.

STEP 2 Select **Law Dictionary** from the **Legal Research...** main menu.

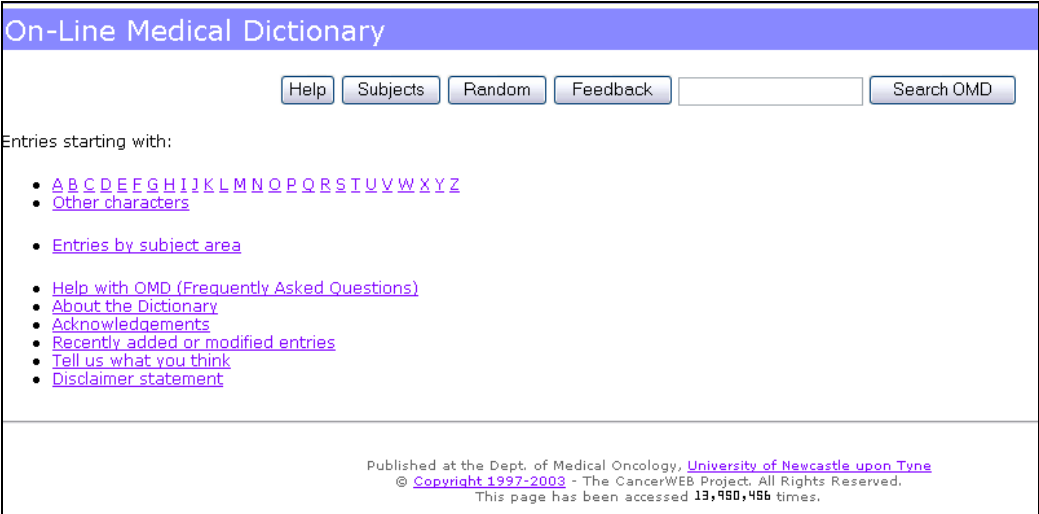


Legal Research... Medical Dictionary

This option links to the On-Line Medical Dictionary provided by the CancerWEB Project).

STEP 1 Select **Utilities** from the **Main Menu**, click on **Legal Research...** hypertext link from the **Miscellaneous** menu.

STEP 2 Select **Medical Dictionary** from the **Legal Research...** main menu.



The screenshot shows the 'On-Line Medical Dictionary' web interface. At the top is a blue header bar with the title 'On-Line Medical Dictionary'. Below the header is a navigation bar with buttons for 'Help', 'Subjects', 'Random', 'Feedback', and a search box labeled 'Search OMD'. The main content area is titled 'Entries starting with:' and contains a list of links: 'A B C D E F G H I J K L M N O P Q R S T U V W X Y Z', 'Other characters', 'Entries by subject area', 'Help with OMD (Frequently Asked Questions)', 'About the Dictionary', 'Acknowledgements', 'Recently added or modified entries', 'Tell us what you think', and 'Disclaimer statement'. At the bottom of the page, there is a footer with publication information: 'Published at the Dept. of Medical Oncology, University of Newcastle upon Tyne', '© Copyright 1997-2003 - The CancerWEB Project. All Rights Reserved.', and 'This page has been accessed 13,950,456 times.'

Legal Research... Westlaw via the Internet

This option links to Westlaw's commercial web site. A subscriber account is needed.

STEP 1 Select **Utilities** from the **Main Menu**, click on **Legal Research...** hypertext link from the **Miscellaneous** menu.

STEP 2 Select **Westlaw via the Internet** from the **Legal Research...** main menu.

The screenshot shows the Westlaw website's sign-in interface. At the top left is the Westlaw logo. To its right is a promotional banner for west.thomson.com, stating 'Shop over 4,500 legal products and services online at west.thomson.com/store. Ground shipping is FREE in the United States.' Further right is another banner for Westlaw® Text Only, WestFind&Print®, Westlaw Database List, Online CLE Programs, Marketing Your Firm with FindLaw, and LawSchool.westlaw.com Shop for Legal Products. Below these banners is a navigation bar with links: About Westlaw, Product Information, Reference Materials, Subscription Options, Customer Service, Westlaw Training, and WLD Profile Update. The main content area is titled 'Sign-On' and features a sign-in form with fields for 'Westlaw password' and 'Client ID', a 'GO' button, and checkboxes for 'Save this password' and 'Return to last research trail'. A link 'Sign on using My Sign-On' is also present. On the left side of the sign-in area is a small portrait of a woman. Below the sign-in area is a link 'No Westlaw Password? Access Westlaw with a credit card.' At the bottom of the sign-in area are links: 'Sign-On Help | Pricing Info | Use a Secure Connection | Accessibility Information'. On the right side of the page is a section titled 'What's New in westlaw.com ?' with three bullet points: 'New ResultsPlus™ returns additional related content allowing you to do better, faster legal research.', 'New! Business information and news tools customized for your practice.', and 'Research the latest corporate scandals.' At the bottom right is the Thomson West logo. The footer on the bottom left reads '©2003 West'.

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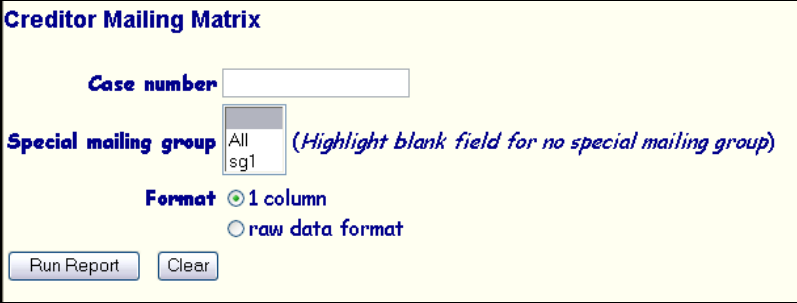
©2003 West

Mailings... Creditor Mailing Matrix

The **Creditor Mailing Matrix** report displays the list of creditors for a specific case. The list contains those creditors uploaded at case opening and may or may not include parties that have filed/docketed a pleading to the case. All creditors on this report were added through the Creditor Maintenance option of the system and used by the BNC (Bankruptcy Noticing Center) for Court generated notices.

STEP 1 Select **Utilities** from the **Main Menu**, click on **Mailings...** hypertext link from the **Miscellaneous** menu.

STEP 2 Select **Creditor Mailing Matrix** from the **Mailings...** main menu.



The screenshot shows a web form titled "Creditor Mailing Matrix". It contains the following elements:

- A text input field labeled "Case number".
- A dropdown menu labeled "Special mailing group" with "All" and "sg1" as visible options. To its right is the text "(Highlight blank field for no special mailing group)".
- Two radio buttons under the label "Format": "1 column" (which is selected) and "raw data format".
- Two buttons at the bottom: "Run Report" and "Clear".

- ◆ Enter case number.
- ◆ Click to select appropriate **Format** radio button.
- ◆ Click **Run Report** or **Clear** to reset search criteria.

STEP 2 **Search Results** screen appears listing creditors for case specified.

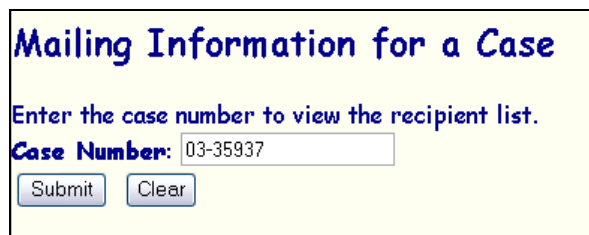
STEP 3 To print, click **Print** button from browser toolbar.

Mailings... Mailing Info for a Case

Displays a list of attorneys who receive e-mail notices and attorneys who require manual noticing for a specific case.

STEP 1 Select **Utilities** from the **Main Menu**, click **Mailings...** hypertext link from the **Miscellaneous** menu.

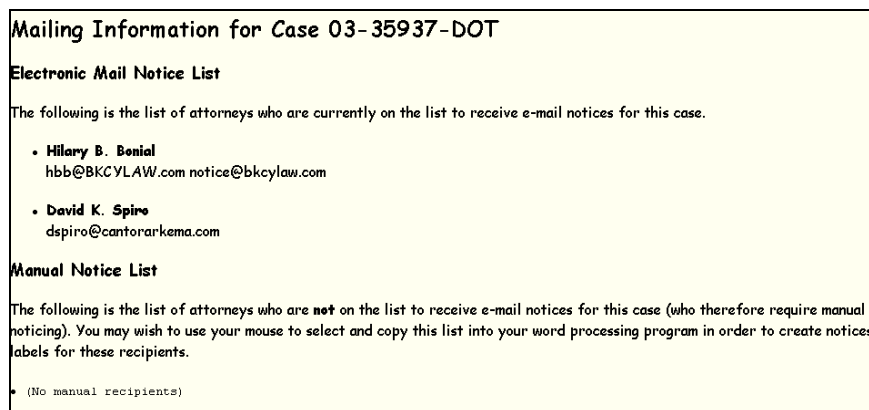
STEP 2 Select **Mailing Info for a Case** from the **Mailings...** main menu



The screenshot shows a web form titled "Mailing Information for a Case" in blue text. Below the title, it says "Enter the case number to view the recipient list." There is a label "Case Number:" followed by a text input field containing "03-35937". Below the input field are two buttons: "Submit" and "Clear".

- ♦ **Case Number** – enter case number.
- ♦ Click **Submit** to continue or **Clear** to reset.

STEP 3 **Mailing Information** screen for specified case appears.



The screenshot shows a web page titled "Mailing Information for Case 03-35937-DOT". It has two sections: "Electronic Mail Notice List" and "Manual Notice List".

Electronic Mail Notice List

The following is the list of attorneys who are currently on the list to receive e-mail notices for this case.

- **Hilary B. Bonial**
hbb@BKCYLAW.com notice@bkcyllaw.com
- **David K. Spiro**
dspiro@cantorarkema.com

Manual Notice List

The following is the list of attorneys who are **not** on the list to receive e-mail notices for this case (who therefore require manual noticing). You may wish to use your mouse to select and copy this list into your word processing program in order to create notices labels for these recipients.

- (No manual recipients)

STEP 4 To print, click **Print** button on browser toolbar.

Mailings... Mailing Labels by Case

Displays name/address data in label format for a specific case. Parties that appear on this report consist of both uploaded creditors from schedules AND parties who have filed a pleading in the case.

STEP 1 Select **Utilities** from the **Main Menu**, click **Mailings...** hypertext link from the **Miscellaneous** menu.

STEP 2 Select **Mailing Labels by Case** from the **Mailings...** main menu. **Mailing Labels by Case** screen appears for you to specify what types of participants you want displayed.

Mailing Labels by Case

Case number 03-30129

☒ **All** Select ALL participants for case

OR
Select any combination of the following

Participants Special mailing group Creditors

3rd Party Plaintiff
3rd Pty Defendant sg1
Creditor Committee Members
Creditors who have filed claims

☐ **Judge** ☐ **Attorneys** ☐ **Debtor's attorney(s)**
☐ **US Trustee** ☐ **Trustee**

Print format 1 column
2 columns
3 columns

Next Clear

- ♦ **Case number** – enter case number.
- ♦ **All** – select all participants for case.

OR select specific criteria

- ♦ **Participants** – select and click specific participant.
- ♦ **Creditors.**

[Note: To select two or more items from the above fields, press <Ctrl> button then click each item to be included.]

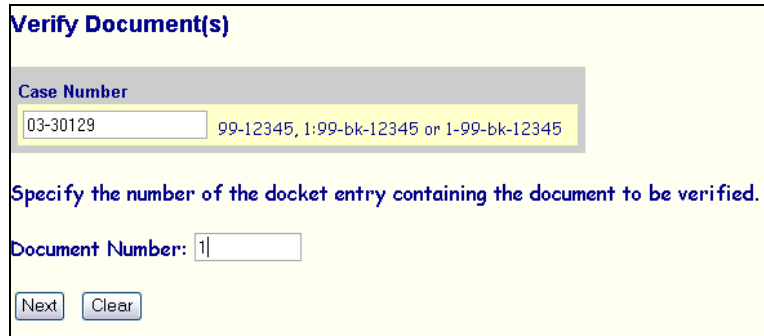
- ♦ **Judge/Attorney/Debtor's attorney(s)/US Trustee/Trustee** – click in box to include one or more.
- ♦ **Print format** – select and click print format from list.

STEP 3 Select **Next** to continue or **Clear** to reset.

Verify a Document

Verifies that the electronic “signature” of the current document is the same as the originally filed document. If it is different, the document may have been altered.

STEP 1 Select **Utilities** from the **Main Menu**, click **Verify a Document** hypertext link from the **Miscellaneous** menu. **Verify Document(s)** selection screen appears:



- ♦ **Case Number** – enter case number.
- ♦ **Document Number** – enter document number.

STEP 3 Click **Next** to continue or **Clear** to reset.

STEP 4 **Verify Document(s)** screen appears displaying information regarding ‘signatures’ on the .pdf document. The screen should display the message: **The documents signatures are the same.** If the screen displays: **The documents signatures are different**, contact the court immediately as there may be a problem with the document. To continue, click on **Main Menu** option of your choice.

